Madrona Bookkeeping & Tax Services, Inc
3208 50th St Ct NW Ste 102B
Gig Harbor, WA 98335

Dear Tax Client,

We appreciate the opportunity to prepare your tax return for the 2022 tax year. If you need an organizer to help gather your information, please let us know. We can send this to you electronically or via USPS mail. We have continued our efforts to reduce our paper usage and waste. Please upload your tax documents, this letter, and an updated copy of your driver's license to our secure portal. The portal and our online scheduler are available on our website, www.madronabookkeeping.com.

The IRS does not allow tax preparation fees to be deducted from your federal tax refund. We cannot release any tax returns without payment in full, so please be prepared to settle any outstanding balances prior to picking up or electronically receiving your return documents. For your convenience we do offer several payment options and are willing to work with you. Any information received within fourteen (14) days of filing due date will have an additional 25% Rush fee added to the invoice and 50% rush within seven (7) days, this does not apply to those who file extensions. Our tax preparation fees have changed for the 2022 tax year, please visit our website for more information, or call/email to inquire. (253) 858-2633.

Your original records will be returned to you at the end of this engagement. You should securely store these records, along with all supporting documents, cancelled checks, etc. As these items may later be needed to prove accuracy and completeness of a return. Copies of your return, supporting documents, and my notes will be retained by Madrona Bookkeeping & Tax Services, Inc for seven (7) years, after which these documents will be destroyed.

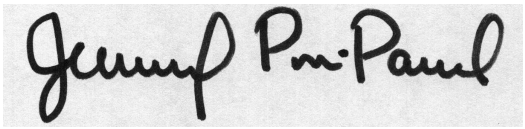
We also have Christopher Spaeth on staff this year assisting with tax preparation, please welcome him. Thank you for allowing us to serve you this tax season!

This year we will also be supporting local charities in the community. Donating to one of these charities will earn you a **$15 discount** on your tax preparation services. Please inquire as to our **SENIOR DISCOUNT** as well.

Please sign the back of this letter to confirm your agreement →

To affirm that this letter correctly summarizes your understanding of the arrangement for this work, please sign at the bottom and return with your tax documents.

Thank you again for allowing our office to prepare your return this year! We appreciate your business!



Jennifer Price-Paul
Madrona Bookkeeping & Tax Services, Inc
President

Print:
Taxpayer Name: _____ Taxpayer Spouse: _____

Signature: _____ Signature: _____

Date: _____/_____/_____ Date: _____/_____/_____